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ABSTRACT

A study was aimed at helping to define the information needs of persons who are directly involved in developing education policy at local and state levels. Five organizations interviewed for this project were: Education Commission of the States (Denver, Colorado); National Association of State Boards of Education (Washington, District of Columbia); National Conference of State Legislatures (Denver, Colorado); National Congress of Parents and Teachers (Chicago, Illinois); and National School Boards Association (Washington, District of Columbia). Section I, the introduction, discusses: (1) ERIC Mission and Objectives; (2) The Role of ERIC Clearinghouses; (3) Purposes of the Project; and (4) Organization of the Project Report. Section II describes the study design, and section III details the findings. The first part of this third section presents a composite of the issues and issue areas identified as organization priorities. The second part deals with tracking mechanisms currently in place or those under consideration for future implementation in the organizations. The third part gives a capsule description of products the organizations are employing in their attempts to respond to issue-based information needs. Included in this part is an "Issues Management Profile" for each organization. The section's fourth part presents ideas about response forms and format to important issue-related information needs to consider in further information services development. Section IV, "Suggested Next Steps," lists eight possible future ERIC projects. (JMK)

ED229388

IDENTIFYING POLICYMAKER INFORMATION NEEDS FOR THE ERIC SYSTEM

A Special Project Report

by Joost Yff

February 28, 1983

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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PREFACE

The leadership of the Educational Resources Information Center system have expressed concern over the degree to which ERIC can and does respond effectively to the information needs of education policymakers at state and local levels. This study represents an initial step in further development of ERIC's capability in this area.

The fact that the study was conducted under a severe time constraint--in effect, 6 weeks--may be viewed as a disadvantage transformed. Some readers may conclude that the study was done too quickly and leaves too many questions unanswered. From the Baconian point of view, in which all relevent data must be amassed before inferences can be drawn, such criticism would ring true.

However, as suggested in the body of this report, there is utility in studies like this one, especially when they are allowed to be periodically replicated.

Neither the issues confronting education policymakers, nor the information that relates to those issues, seem to stand still for very long. Issues that change shape overnight do not lend themselves to deep analysis as prerequisite to response. But the development of mechanisms to identify them as they emerge and/or change, and of ways to respond with relevant information in a timely fashion, are tasks that demand thoughtful attention.

We thank the leaders of the five participating organizations for their assistance and for their tolerance in entertaining visits by the investigator on short notice. The individuals who assisted are identified in the body of the report.

Given the short life of the project, it is likely that each participating organization and its constituency will not be represented in as complete detail as would be desirable; it is hoped that each will be given the opportunity to review this report, with special attention to the Issues Management Profile, and submit modifications to be incorporated in a later revision.

Joost Yff, Director
ERIC Clearinghouse on Teacher Education
February 1983

SECTION I
INTRODUCTION

The creation, diffusion, and application of knowledge, and the nurturance of educational research and development capabilities nationwide, are important areas of concern for the National Institute of Education. Within the broad framework represented by the NIE's dual missions of improving educational practice and equalizing educational opportunity, a variety of tasks have been pursued to enhance both the production and the utilization of educational knowledge.

With respect to knowledge production, these tasks include research, policy analysis, information synthesis, and evaluation of federally funded activities intended to affect practice and equity. With respect to knowledge utilization, these tasks have included assessment of information needs, information gathering and repackaging, development of dissemination strategies that enhance information availability and encourage information application, and evaluation of information utilization behavior and patterns. The NIE's efforts to pursue these tasks have stimulated and supported, directly or indirectly, the educational information service capabilities of regional government offices, state departments of education, school districts and local schools, institutions of higher education, professional associations, and a variety of libraries, reference centers, and resource centers.

These efforts have been manifested in a variety of programs, including the National Diffusion Network/Joint Dissemination Review Panel, the earlier Research and Development Utilization Program, the Research and Development Exchange, the earlier Pilot State Dissemination Program, the State Dissemination Grants Program, and especially the Educational Resources Information Center (ERIC) program.

ERIC Mission and Objectives

Since its inception in 1966, ERIC has become an indispensable resource to increasing numbers of education practitioners and decision-makers, state and federal legislators, and administrators concerned with education. With some modification, the objectives identified by Lee G. Burchinal in 1968, when ERIC was two years old, still hold true today:

- to make significant, but previously unavailable, R & D reports easily and readily available to educators;
- to interpret and summarize results in ways that educational practitioners and decision-makers can use them;
- to help strengthen existing educational communication channels for putting R & D results to use; and
- to become an important base for developing a national education information network.

Over the years, ERIC has followed the mission of enhancing the application of information to improve educational policy, planning, and practice in the United States. Originally conceived to provide an information support system for documents received by the U.S. Office of Education's Bureau of Research, ERIC soon expanded its role to actively seek, index, abstract, and make available fugitive documents from other sources as well, and to foster awareness of and access to these resources on a nationwide scale.

The Role of ERIC Clearinghouses

ERIC is a mature information system. As such, each of its components is a vital and specialized component of the whole. Under the control and general direction of the United States Government through DOE/NIE/DIP, the system is characterized by dynamic interaction among its components in order to maintain and develop further the system's national information support capabilities for education.

The three primary functions of ERIC clearinghouses are database building, information analysis, and user services, all within a subject scope defined by system rules. Ancillary functions are clearinghouse management and participation with other components in system development.

The database building function is intended to add to the ERIC system files--Resources in Education (RIE), and Current Index to Journals in Education (CIJE)--resumes of selected fugitive documents and journal articles on a regular basis.

The ERIC clearinghouses search out, acquire, select, and process documents for the RIE file, and provide a document resume (including cataloging information, indexing, and an abstract) of each to the ERIC Processing and Reference Facility. The Facility also receives a copy of the document suitable for microfiche and/or paper reproduction.

With respect to the CIJE file, the clearinghouses share responsibility for processing education-related articles in over 700 journals. Journal article resumes (including cataloging information, indexing, and an annotation) are produced by the clearinghouses and transferred to the ERIC Processing and Reference Facility.

The information analysis function is intended to reprocess information that resides in the system files (and in other current sources as appropriate) to make it more useful to current and near-future information needs of education practitioners and decision-makers. This function acts in response to user needs and Advisory Board input to enhance ERIC system holdings by dealing with areas not fully treated in the database.

The ERIC clearinghouses perform this function through the identification of important issues and information needs; the aggregation, analysis, and synthesis of relevant information; and the publication of the results of these efforts in the form of information analysis products, bibliographies, fact sheets, and other issue-oriented papers.

The user services function is intended to assist in enhancing the availability of ERIC files and products and in encouraging the use of ERIC as an information source.

The ancillary functions of clearinghouse management and system development are internally directed efforts, as opposed to the direct impact on users of database building, user services, and information analysis. These ancillary functions do affect the relationships between provider (ERIC) and user through the promotion of efficient, cost-effective fulfillment of obligations and through the improvement of system functioning.

The clearinghouses are operated by organizations and institutions with primary interests in matters within the scope areas of the particular clearinghouse. In turn, these institutions and organizations are generally prime actors within the education communities particularly interested in the individual clearinghouse scope of interest. Thus, in all three major functions, clearinghouses, and the groups that run them, represent the ERIC system to the related user communities and represent to the ERIC system the information needs of practitioners, researchers, and decision makers in those communities.

Purposes of the Project

As indicated above, ongoing system development is integral to ERIC's functioning. This project is an example of system development activity. There is consistency between the purposes of this project and the mission and objectives of ERIC identified earlier. The purposes of the project are predicated on a basic assumption about how information services can be made effective. Whether with respect to the database building, information analysis, or user services function of ERIC, it is assumed that there is a direct positive correlation between the utility of each of these functions and the degree to which ERIC personnel can be cognizant of major educational issues and information needs as these evolve within and among various user populations.

ERIC clearinghouses have many ways of keeping informed on emerging issues confronting their constituent and client groups. While issues identification has become routine practice among the clearinghouses for relatively narrowly defined client groups (e.g., school administrators, science teachers, teacher educators , school counsellors), it is more difficult to address the needs of a large target group such as education policymakers, whose information needs are likely to be more volatile and diverse. An added characteristic of education policymakers as a group is their perceived need for a very quick response on a current issue, as well as a need to be informed about viable options or alternative responses to an issue. This project was aimed at this large group of persons at state and local levels who have direct involvement in the shaping of education policy through state boards of education, local school boards, state legislatures, and parent/teacher organizations.

With the ultimate goal of further enhancing the capability of the entire ERIC system to respond to these information needs, the specific purposes of the project were:

1. to identify key current and emerging issues for which education policymakers need information;

2. to draw out suggestions and ideas about the kinds of products and services most likely to respond to these information needs;

3. to extract implications for later development of an ongoing, quick-response, issues-sensing network or system that would enhance and help to direct the current response capabilities of ERIC system components.

Organization of the Project Report

The study design is briefly described in Section II. The results of discussions with organization leaders and references to selected organization products appear in Section III. A number of suggested next steps are given in Section IV. Samples of organization products and forms appear in the Appendix.

SECTION II
STUDY DESIGN

The study was aimed at helping to define the information needs of persons who are directly involved in developing education policy at local and state levels. These persons are found as members of local school boards, state boards of education, state legislators and their staffs, and persons at the community level who involve themselves in school activities as parents and/or concerned citizens. One way of defining this diverse population is as that group of citizens who impact directly on education policy but who are not professional educators or employees of education systems. The population was operationally defined as those persons comprising the memberships of the following organizations.

- o The Education Commission of the States, Denver, Colorado (ECS)
- o The National Association of State Boards of Education, Washington, D. C. (NASBE)
- o The National Conference of State Legislatures, Denver, Colorado (NSCL)
- o The National Congress of Parents and Teachers, Chicago, Illinois (NCPT)
- o The National School Boards Association, Washington, D.C. (NSBA)

These organizations and their respective professional staffs were assumed to stand as appropriate surrogates for their memberships, at least insofar as representing current issues and related information needs was concerned. Thus, rather than going directly to the policymakers (the NCPT alone claims six million members), this study was conducted on the assumption that the organizations' leaders stood as a source of data that was adequate, representative, and most efficiently accessed.

The study was conducted over a period of seven weeks, beginning on 2 January, 1983. The first two weeks were consumed in contacting the subject organizations, soliciting their participation, and arranging meetings. The first meeting, with ECS, occurred on 13 January, 1983. The last meeting, with NCPT, occurred on 1 February, 1983. The names of the organization leaders who participated appear in the Issues Management Profiles beginning on page 14.

Both the assumption that organizations can stand for their respective memberships, and the severe time constraint under which the study was conducted, must be viewed as limitations in interpreting study findings. An alternative, demanding substantially greater resources, would have been to survey directly the target population, through some kind of sampling design. However, a disadvantage of such an approach would have resulted from attempting to "pin down" volatile issues over a longer period of time--resulting in findings that may have lost their currency and relevance by study's end.

It may well be that quick, "snap-shot" studies of the sort reported here, conducted periodically, provide issues tracking data of greater utility because of their currency.

The meetings with organization leaders were conducted informally, but each event was aimed at eliciting responses to the following questions.

1. What are the primary issue areas currently confronting the membership? How are these issues identified and prioritized?

2. What are the ways in which the organization is responding to and dealing with the issues?

3. What are the most likely emerging issues for the next half-year or so?

4. What are the ways in which the organization will attempt to respond to these emerging issues?

5. What kinds of information would help the staff to respond, in what forms, and on what timeframe?

6. How does the organization envision an "alerting" process for emerging issues and information needs that would enhance current capabilities?

The outcomes of these meetings and various organization products were then analyzed to produce the information presented in the following section.

SECTION III
FINDINGS

This section presents the findings obtained during the discussions with organization leaders in Washington, Denver and Houston over the period from 13 January to 5 February, 1983. Also included are references to various information services products of the organizations, as well as information obtained from responses to a query to each of the ERIC clearinghouses.

The first part of this section presents a composite of the issues and issue areas identified as priorities of the organizations. Given the volatility of many issues, the findings should be viewed as a snapshot taken at one point in time.

The second part of this section deals with issues sensing or tracking mechanisms that are currently in place in the organizations or that are currently under consideration for implementation in the near future.

The third part of this section gives a capsule description of the kinds of products that the organizations are employing in their attempts to respond to issue-based information needs. The three dimensions--issues, issues tracking, and responding mechanisms-- are further detailed in the form of an "Issues Management Profile" for each organization.

The fourth part of this section presents some ideas about the form and format of responses to issue-related information needs that the organizations feel are important to consider in further development of information services.

Although ERIC clearinghouses were not included in the original study design, a query was sent to each in order to determine whether there are issues tracking mechanisms in place that are focussed specifically on the education policymaker population of this study. Also, the question was asked as to whether there are issues specifically attributable to the study population. The results of this query yielded responses from most ERIC clearinghouses, and the results are presented in the last part of this section.

Composite of Priority Issues
January-February, 1983

The priority issues identified by leaders of each of the five organizations are presented in the form of "Issues Management Profiles," appearing as pages 14 through 23. Aggregated as a single mass, the issues behave much as the sticks in a game of "pick-up-sticks." "Touching," or attempting to deal with, one of the issues automatically leads to "movement" on the part of others. In short, the issues are not mutually exclusive, and they interact in various ways.

In the aggregate, the issues found to be of greatest current importance fall into three major categories of concern: money, technology, and educational quality. Each of these three categories can be analysed to form two major subcategories. These are depicted in Figure 1, which lays out issues at an additional level of specificity within these subcategories.

It should be noted that one set of issues, emanating largely from the NCPT, are not included in the array of Figure 1. These issues, consistent with the NCPT primary mission of "improving the lives of children," are different from the others in that they focus directly on the conditions of elementary and secondary education students and community involvement in decision-making at the local level. These issues are in areas such as drug abuse, child abuse, teen pregnancy, parenting, video arcades, and parent involvement in the schools. The related list of primary current issues appears in the Issues Management Profile beginning on page 20.

COMPOSITE OF EDUCATION ISSUES CONFRONTING EDUCATION POLICYMAKERS AT STATE AND LOCAL LEVELS, JANUARY - FEBRUARY, 1983

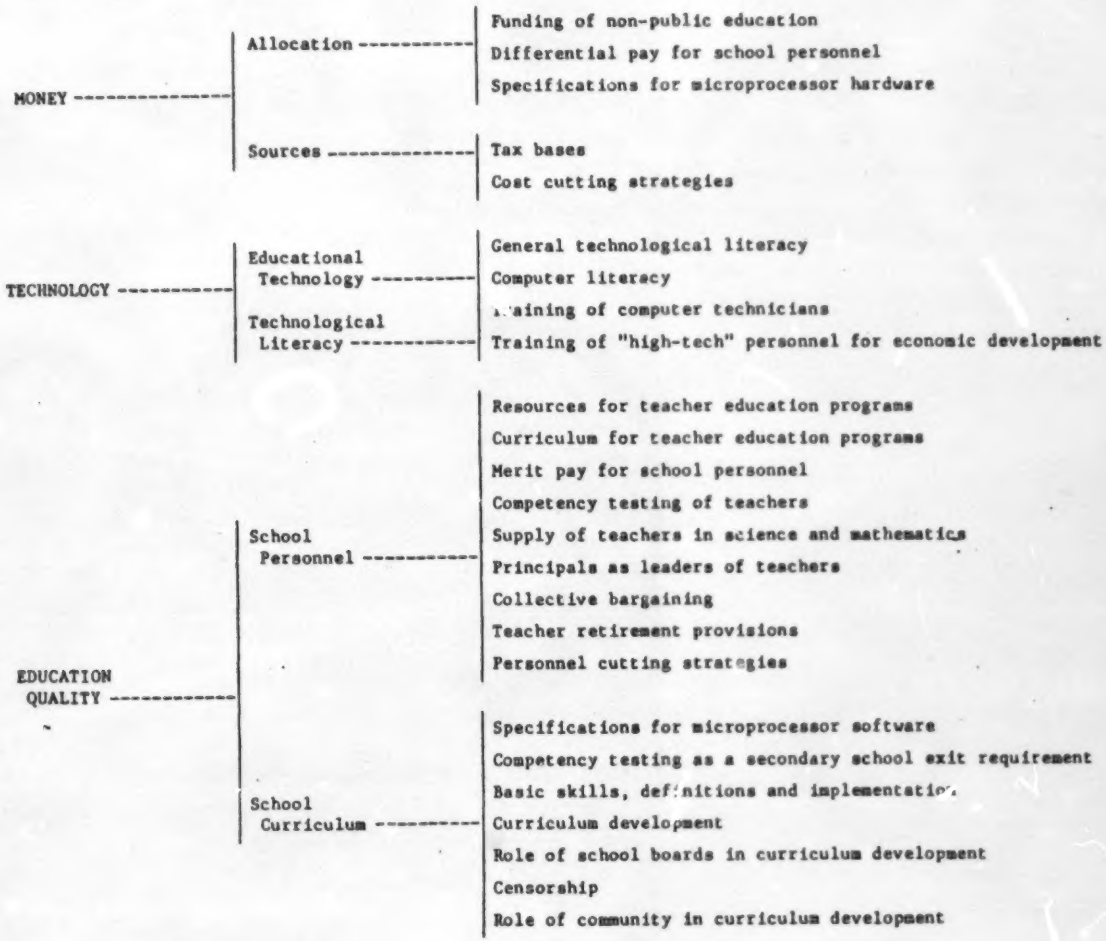

Figure 1

Issues Tracking Mechanisms Currently In Place

The ways in which the organizations currently remain up-to-date on issues confronting their respective constituencies do not vary greatly from one to another.

Daily interactions between organization staff and members is a pervasive and primary means of knowing what the issues are. The assumption on which the procedure of this study was based--namely, that organizations stand as appropriate surrogates for their constituencies--can be extended to assume that organization staff members and elected leaders can adequately represent their membership insofar as the identification of important issues is concerned.

A second mechanism that is found in all the organizations is participation in meetings, seminars, workshops and conferences at local, state, regional and national levels.

In the case of both daily interactions and those occurring during meetings and conferences, it appears that the organization staff and elected leadership form the main conduit whereby issues are fed into the program planning process.

Additional, and more purposeful, solicitation of information from the membership is effected in a number of ways. Annual or semi-annual opinionaires, "feedback" sheets as part of regular publications and flyers, and periodic telephone surveys of key leaders all appear as issues tracking mechanisms. Further information about these appear in the "Issues Management Profiles" beginning on page 14.

Issues Responding Mechanisms Currently In Place

Just as daily interactions between staffs and constituencies represent a primary means of issues tracking, the ongoing process of developing "custom" responses to queries on a daily basis represents a primary means of responding to members' information needs. This process is characterized by staff using its organizational files, each other, and key field persons contacted usually by telephone for current leads and information. It is a process that is common in the work of professional association staff personnel.

In addition to developing tailored, individualized responses, organizations attempt to reduce the load of doing so by also developing various kinds of products that are designed to respond to

information needs found or expected to be extant among substantial portions of the constituencies. These products appear as articles in organization journals, which usually suffer from long production lead times, and in "issuegrams," "issue briefs," and flyers of various sorts, that can be produced on a relatively short production schedule. Examples of these products appear in the Appendix.

Distribution of these products is typically membership-wide, although an important new development seems to be surfacing. In the face of fiscal constraints and the increasing costs of producing and distributing printed products, there is now a concern about how well the alternative of "on-demand" distribution serves the purposes of the organization and the needs of the membership. Too little is known about what happens to products distributed to all members of an organization. It may well be that only a small proportion of the pieces distributed will be found to hold current relevance once they reach their destinations. If this were true, then provision of these products in some sort of quick mode upon receipt of an information request should be considered as an alternative.

The current ultimate in "quick mode" is, of course, effected by means of computer networks. The use of electronic mail or electronic bulletin board is under consideration by virtually every organization. Some have an active capability at this time. For example, the NASBE headquarters office in Washington D.C., and all of the state boards of education are current subscribers to the Compuserve service. In late February, 1983, NASBE announced that Texas Instruments has donated to each state education agency a computer terminal, two subscriptions to The Source (a nationwide computerized network), and training in the use of the equipment. Another example is ECS, that also subscribes to The Source. A third example is NCSL, which maintains, through its Legislative Information Service, a file of state house committee reports and information about legislature operations. These and other details appear in the "Issues Management Profiles" that begin on the following page.

ISSUES MANAGEMENT PROFILE
EDUCATION COMMISSION OF THE STATES

1860 Lincoln Street, Suite 300
Denver, Colorado 80295
(303) 830-3600

Issues Tracking Mechanisms

1. Daily staff interactions with constituency (governors, legislative leaders and their senior policy aides, chief state school officers, state higher education executive officers and their senior policy associates, state education boards, state leadership of local schools and campuses, and others who are not in these categories but who are appointed by governors as ECS Commissioners).

2. Semi-annual survey of key state education leaders (a new mechanism, with returns from first cycle due in mid-February 1983. A copy of the survey instrument appears in the Appendix).

3. Usage data from requests for "ECS Issuegrams."

4. Teleconferences with legislative and education contact persons in each state.

5. Interactions during workshops and conferences.

Issues Responding Mechanisms

1. Custom-tailored responses for primary constituency members.

2. Off-the-shelf "ECS Issuegrams" mailed on demand (a sample Issuegram, and a list of Issuegrams available or in process, appear in the Appendix).

3. Consideration is being given now to placing "Issuegrams" and results of custom-tailored responses on an electronic mail or bulletin board service.

4. Seminars, workshops, and conferences.

5. Articles in journals (an example, "State Legislators Will Wrestle Deficits in 1983," by Chris Pipho, appears in the Appendix).

Primary Current Issues

1. The supply of math and science teachers and ways to improve it (loan programs, salary differentials, business/education cooperative programs).

2. Technology. General computer literacy, the role of vocational/technical schools vis a vis state colleges in providing programs for computer technicians and programmers.

3. Standards for math and science in the schools primarily as they relate to basic skills and technological literacy.

4. Financing education.

5. Collective bargaining, merit pay for school personnel, and teacher retirement provisions.

6. Community involvement in education.

Information Contact Persons

Russ Vlaanderen, coordinator, Information Clearinghouse Services (303) 830-3800

Chris Pipho, deputy director, Information Clearinghouse (303) 830-3801

Bob Palaich, political scientist (303) 830-3801

Don Burnes, director, Education Governance Center (303) 830-3830

ISSUES MANAGEMENT PROFILE
NATIONAL ASSOCIATION OF STATE BOARDS OF EDUCATION

526 Hall of the States
444 North Capitol Street
Washington, D. C. 20001
(202) 624-5845

Issues Tracking Mechanisms

1. Daily staff interactions with constituency (members of state boards of education and their staffs).

2. "Five-Year Goals and Objectives Survey" through the "NASBE Contact Network" is underway (returns are expected in mid-March, 1983. A copy of the survey instrument appears in the Appendix).

3. Issues identification requests are a regular feature of State Board Connection. a "news flyer" (the last page of the May, 1982 issue, which appears in the Appendix, is an example).

4. Bimonthly teleconferences initiated by staff with contact network (forms and analysis formats used for this input source, as well as details of the NASBE Contact Network, appear in the Appendix.)

5. Interaction in four regional meetings per year, where issues are the primary focus.

Issues Responding Mechanisms

1. Custom-tailored responses for primary constituency members.

2. Off-the-shelf "Issuebriefs" mailed on demand (a sample Issue Brief appears in the Appendix).

3. An electonic mail or bulletin board service (through Compuserve) is currently under development. All state boards are on Compuserve. A further development is reported in the February, 1983, issue of NASBE's State Board Connection. Texas Instruments has donated to each state education agency a terminal, two subscriptions to The Source, and training in equipment use (the newsletter announcement is included in the Appendix).

Primary Current Issues

1. Math, science and technology. Improvement of secondary math and science teaching, implementation and use of information processing technology.

2. Improving staff quality. Preservice teacher education, teacher/ principal certification, incentive systems, competency testing.

3. Improving school quality. Higher order skills, school accreditation requirements, curriculum, minimum competency requirements and other accountability programs, dissemination and adoption assistance.

4. Links between higher education and K-12 institutions.

Information Contact Persons

Roberta Felker, project director

Kathy Williams, director, Information Services

Anita Epstein, director, Federal Relations

Ron Howard, coordinator, Technical Assistance

ISSUES MANAGEMENT PROFILE
NATIONAL CONFERENCE OF STATE LEGISLATURES

1125 Seventeenth Street
Denver, Colorado 80202
(303) 292-6600

Issues Tracking Mechanisms

1. Daily staff interactions with constituency (state legislatures and their staffs).

2. Interactions during issue-oriented seminars, conducted three times a year in collaboration with ECS.

3. Interactions during national meetings, assemblies, conferences.

Issues Responding Mechanisms

1. Custom-tailored responses for primary constituency members.

2. The Legislative Information Service, an online HP3000 minicomputer in the Denver office to which about 28 legislatures have access through their own terminals. The file includes house committee reports, legislature operations information, and some bills.

3. The Profile System, a file housing various analyses done by staff on legislator compensation, travel policy, legislative calendars, directory of leaders in legislatures, and election results.

4. Consideration is being given to an electronic mail or bulletin board system.

5. "Issue Briefs," off-the-shelf, mailed on demand (a sample copy appears in the Appendix).

6. A biweekly newsletter, "Capital to Capital," a copy of which appears in the Appendix).

7. A monthly journal, State Legislatures, a sample copy of the masthead and contents page of which appear in the Appendix).

Primary Current Issues

1. Educational quality, considered to be at the root of all issues.

2. School finance, new sources of revenue, funding for high cost populations (as in special education), cost-effectiveness strategies.

3. Competency testing.

4. Recruitment, retention, retraining of education personnel, with current emphasis on the fields of math and science.

5. The role of principals as leaders of teachers.

6. Technology in education, both computer literacy and general technological literacy. This is linked with the role of education in economic development of states through provision of appropriately trained "high-tech" personnel.

7. Actions of federal government that impact on school finance.

8. Higher education, including tuition policy, student financial assistance, student loans, public vs. private. Ability of IHE's to support jobs training programs to attract and retain growth industries, quality of teacher education.

9. School district consolidation, with respect to fostering quality education in rural areas, economies of scale, cost effectiveness.

10. Racial equality and the quality of learning.

Information Contact Persons

William Harrison, director of education research (202) 624-5423

ISSUES MANAGEMENT PROFILE
NATIONAL CONGRESS OF PARENTS AND TEACHERS

700 North Rush Street
Chicago, Illinois 60611-2571
(312) 787-0977

Issues Tracking Mechanisms

1. Daily staff and leadership interaction with constituency members (concerned parents and other community members working at local, district, state, regional and national levels).

2. Interaction during meetings and conferences, "filtering up" from local through district/council, state, regional to national level.

3. Communication within the organization's infrastructure.

Issues Responding Mechanisms

1. Custom-tailored responses for primary constituency members.

2. Meetings and conferences at national, regional, state, district and local levels.

3. Study/discussion guides in PTA Today, the monthly journal (a sample copy of a "Program Guide" appears in the Appendix).

4. Special issue-related publications, including single-issue flyers (examples are "Children and Television," and "America's Runaways," both of which appear in the Appendix).

Primary Current Issues

1. Improving the lives of children.

2. Prevention of drug abuse.

3. Parent involvement in the schools.

4. Computer literacy.

5. Educational technology.

6. Developing self-discipline in children.

7. Quality and competency of teachers.

8. Censorship.

9. Basic skills, broadly defined to include the fine arts.

10. Video arcades, impacts, policies.

11. Financing non-public education.

12. Teen pregnancy.

13. Child abuse.

14. Parenting.

Information Contact Persons

Robert Woerner, executive administrator (312) 787-0977

Mary Ann Leveridge, president (713) 335-6395

Elaine Stienkemeyer, first vice-president (517) 676-2894

, ISSUES MANAGEMENT PROFILE
NATIONAL SCHOOL BOARDS ASSOCIATION

1055 Thomas Jefferson Street, Suite 600
Washington, D. C. 20007
(202) 337-7666

Issues Tracking Mechanisms

1. Daily staff interactions with constituency (school board members and their staffs).

2. Interactions during NSBA Convention.

3. Interactions during NSBA Leadership Seminars.

4. Interactions of the Federal Relations Network.

5. Annual survey of school board members (latest report appears in January 1983 issues of The American School Board Journal. A copy of the article appears in the Appendix).

6. Consideration is being given to developing a periodic needs assessment process.

Issues Responding Mechanisms

1. Custom-tailored responses for primary constituency members.

2. Leadership Seminars.

3. National Convention.

4. Federal Relations Network.

5. "School Board News," a bimonthly newspaper (especially the "FastReport" section, an example of which appears in the Appendix).

6. "Inquiry & Analysis," a bulletin of the NSBA Council of School Attorneys (a copy appears in the Appendix).

7. Consideration is being given to electronic mail or bulletin board service, in the context of an association-wide study of information and administration computerization needs.

8. Consideration is being given to ways of learning more about the decision-making behaviors and information using preferences of school board members.

Primary Current Issues

1. Funding. Cost cutting in school budgets in time of reduced funding levels. Sources of funds. Tuition tax credits.

2. Personnel evaluation, with emphasis on appropriate ways of reducing staffing levels.

3. Selection criteria for microprocessor hardware.

4. The role of the school board in curriculum development.

5. Censorship.

6. Teacher education programs, effects of cutbacks.

7. Video arcades, influence, policies.

8. Software copyright, especially with respect to programs produced by students (this is not a small area of concern. See, for example, "Hard Cash for Teens in Software," from Today, appearing in the Appendix).

9. The relationship between student achievement and program characteristics.

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Forms and Formats

The recent emergence of "affordable" computer technology and computerized communications networks has led virtually all of the organizations to look to these phenomena for ways to improve their issues tracking and information services activities. As reported above, "electronic mail" and/or "electronic bulletin board" capabilities are currently in place in some organizations (through Compuserve, The Source, BRS, and in-house minicomputer systems).

The use of electronics is seen as the quickest means of supporting an ongoing issues tracking capability as well as of providing up-to-date issue-related information to geographically dispersed members.

Given the apparent availability and feasibility of electronic systems, the question of what sorts of material should be placed "on the bulletin board" or "in the mailboxes" still needs attention. Such guidelines would apply equally well to the more traditional printed materials such as "Issuegrams," "Issue Briefs," and various newsletters and flyers.

All of the organizations included in this study identified certain basic characteristics that products should possess, whether printed or transmitted through electronic means. A product should be:

- o FOCUSSED;
- o SIMPLE IN LAYOUT;
- o SIMPLE IN LANGUAGE;
- o ACCESSIBLE;
- o CREDIBLE;
- o BRIEF.

The product should be targetted to dealing with a particular, clearly defined issue. The format of the product should enhance readability and scanning, including some means for user selection of portions within the product. The language should be devoid of esoteric terminology or "pedagese." The product should be readily accessible to potential users. The product should be as short as possible, preferably within the equivalent of 2 to 4 pages. The source and style of the product should lead to an inference on the part of the user that the information provided is credible, which

includes the provision of additional sources for deeper investigation of the issue if the user chooses to do so.

With respect to mass distribution of issue papers in printed form, there is emerging a concern over the utility and cost-effectiveness of such an approach. For example, ECS has discontinued its mass mailing of various information products, and is moving toward an on-demand distribution mode. It is believed that while a particular product, such as an "ECS Issuegram," may be immediately useful to only a small proportion of the constituency, that same product is likely to become useful to some others of the constituency at a later time. A response to this phenomenon is to develop ways that will give relevant information on time, and at the time of need.

Another impression relating to mass printing and mailing of issue papers is that "off-the-shelf" products do not serve well the issue-related information needs of the constituencies. In many instances, they are not considered useful even in the development of "custom" responses to individual requests. Not only the volatility of issues, but also their variety and the speed with which relevant information develops, again support expressions of interest in the development of electronic, computer-mediated, communications systems that allow immediate access and modification of information at will.

The sets of issues identified as of primary current importance differentiate the NCPT from the other four organizations. The emphases of NCPT are on Leadership Development, Decision-Making Skills and Parent Involvement, and the NCPT'S three primary organizational processes are Education, Awareness Development and Referral. It appears that people in the local units are not likely to be the primary client group within the organization, but rather those at district, state, regional and national levels. The membership is complex, and perceived levels of information need vary with levels of the organization. There is a general need for learning about education information systems and services. Given that there are 26,000 local Parent Teacher Associations in the U.S., it is felt that primary users will be those at levels above the local units.

With respect to both format and content, the NCPT constituency is reported to be best served by information that relates to practice and programs in schools. As a child advocacy organization, the NCPT focusses on the local school and community level. Although the infrastructure is large and multilayered, this focus is the guide for association program planning and implementation. With respect to formats, the important specifications are lay language, structural simplicity, and ready accessibility. The first two of these characteristics are displayed in the NCPT products, "America's Runaways," and "Children and Television," both of which appear in the

Appendix. The third characteristic--accessibility--is limited like all print materials by traditional modes of distribution.

ERIC Clearinghouses

Since this report is addressed primarily to ERIC's leadership, describing aspects of ERIC Clearinghouses seems somewhat akin to shipping oil to Saudi Arabia.

Nevertheless, a query was sent to each Clearinghouse in order to determine whether there are issues tracking mechanisms in place that are focussed expressly on the education policymaker population of this study. Also, the question was asked as to whether there are important issues specifically attributable to the study population. Most Clearinghouses were able to respond in the short time allowed.

The primary purpose of reviewing Clearinghouse responses to the query was to identify relevant issues and issues tracking mechanisms, rather than to treat responding mechanisms such as Fact Sheets, Information Analysis Products, ERIC file search services, and current "experimental" work in microprocessor-supported ways of improving access to ERIC files.

Comparison of issues identified by the subject organizations and those perceived by ERIC Clearinghouse respondents did not yield any surprises. A high degree of consistency was found between the two sources.

No Clearinghouse reported having a procedure or mechanism expressly intended to track issues/concerns emanating from the education policymaker population as defined in this study.

However, the set of issues perceived by the Clearinghouses as being of primary importance to the study population suggests that Clearinghouse personnel are sensitive to education policymakers' concerns, and that the concerns of specific, primary Clearinghouse user populations do not differ substantially from those of education policymakers at state and local levels.

The issues included in the Clearinghouse responses are listed below; all were identified by more than one respondent.

- o minimum competency testing as a secondary school exit requirement
- o competency testing of teachers
- o supply of teachers in science and mathematics

- o employment and training policy in connection with economic development in the states
- o training for "high-tech" industry personnel
- o censorship
- o basic skills, definition and implementation
- o applications of technology in education
- o funding, sources of revenue for education
- o curriculum development in all disciplines
- o curriculum in teacher education

SECTION IV
SUGGESTED NEXT STEPS

With respect to the further enhancement of ERIC capabilities to respond to the issue-based information needs of education policymakers at state and local levels, the study findings lead to the following suggestions for next steps.

1. Institute an ongoing issues-sensing procedure tuned to the subject population, preferably in the mode of a "step-and-repeat" camera that will take snapshots on a periodic basis. The collaboration of the representative organizations will be crucial to success of such a procedure. (ECS has suggested that consideration be given to effecting issues analysis through the Council of ERIC Directors, as a guide to work in both ERIC and ECS.)

2. Develop further the specifications of what an ERIC Fact Sheet should be, taking into account the characteristics suggested by the subject organizations.

3. Review all ERIC Fact Sheets (and other similar ERIC products) already produced for degree of "fit" with respect to issue areas and format suggested by the subject organizations.

4. Design a procedure whereby current and emerging issues can be quickly translated into a response specification (for a Fact Sheet or other product) and be produced and made accessible/available within a very short period of time (say, less than 10 working days).

5. Investigate aggressively the possibility of placing ERIC Fact-Sheet type products in an electronically accessible environment, as through systems like Compuserve, The Source, or BRS (ECS has suggested that consideration be given to developing a file that holds a combination of products such as NCSL Issue Briefs, ECS Issuegrams, ERIC Fact Sheets, and the like. A menu capability would allow selection within the file).

6. Include provisions for electronic updating of ERIC Fact-Sheet type products and for deleting and inserting entire products to conform with the complex of issues current at any time and with the capacity of the file.

7. In all of the above, take advantage of the work done to date by ERIC and NIE in system enhancement studies (e.g., the current effort being led by the Effective Schools Team, to identify state and local policy issues and to determine ways that research on school and teacher effectiveness can address them; Everett Edington's ERIC handbook, "Finding Education Information: An ERIC Handbook for State Legislators;" the work at ERIC/SE and ERIC/IR on microprocessor applications).

8. Given the strain on ERIC resources, consider reallocating some funds currently expended on Information Analysis Products to the enhancement a quick-response capability through electronically disseminated ERIC Fact-Sheet type products, or the maintenance of a "Fact Sheet File," as discussed during the last ERIC Clearinghouse Directors' Meeting.

As soon as this report has been cleared for distribution, it will be useful to solicit the reactions of the participating organizations. In this way, the data reported here can be further verified, updated, and expanded.

APPENDIX

Contents

Education Commission of the States (ECS) Survey Instrument

ECS Issuegram and List of Issuegrams

ECS Issues Article (Example)

National Association of State Boards of Education (NASBE) Survey Instrument

NASBE "State Board Connection" "Needsflyer" (example)

NASBE Bimonthly Telecons Forms and Analysis Formats

NASBE "Issuesbriefs" (Example)

NASBE Newsletter

National Conference of State Legislatures "Issuesbrief" (Sample Copy)

NCSL "Capital to Capital" Newsletter (Sample Copy)

NCSL Journal State Legislatures (Sample Pages)

National Congress of Parents and Teachers (NCPT) "Program Guide" (Sample Copy)

NCPT Single Issue Flyer, "Children and Television" (Sample Copy)

NCPT Single Issue Flyer, "America's Runaways" (Sample Copy)

National School Boards Association (NSBA) 1983 Issues Survey

NSBA School Board News "Fast Report" (Example)

NSBA "Inquiry & Analysis" Bulletin (Sample Copy)

NSBA Issues Article, "Hard Cash for Teens in Software"

Although these materials are in the original manuscript, they have not been included for reproduction by ERIC because of various reproduction problems. However, addresses of the organizations producing these materials can be found on pages 14-23 of this document.